

3RD QUARTER 2017 MARKETING REPORT

Branson Convention & Visitors Bureau
November, 2017

- U.S. Travel Performance
- Travel Industry Update
- Branson 3Q 2017 Performance
- Branson Visitor Update

PRESENTATION OVERVIEW

TRAVEL PERFORMANCE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF NOVEMBER 10, 2017



U.S. LEISURE & BUSINESS TRAVEL

The U.S. Travel Association forecasts that domestic leisure trips are expected to grow by 1.8% in 2017 with person-trips increasing to 1.75 billion. But, the rate of growth has been slowing in recent years. While this year's growth at 1.8% would be slightly better than last year's 1.7%, it remains far short of the 2.7% average recorded between 2010-2015.

INDUSTRY UPDATE

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UNEMPLOYMENT RATE DROPS TO 4.1%

The latest measure of the U.S. economy has been released: **employment**. The number of nonfarm jobs rose by 261,000 in October, and the unemployment rate declined to 4.1%. The most notable development was a sharp increase in employment at food service businesses, mostly offsetting a steep decline in the previous month due to Hurricanes Irma and Harvey. There were also job gains in professional and business services, manufacturing, and health care. Source: [Bureau of Labor Statistics](#)

SOLID ECONOMIC GROWTH PREDICTION FOR THE FOURTH QUARTER OF 2017

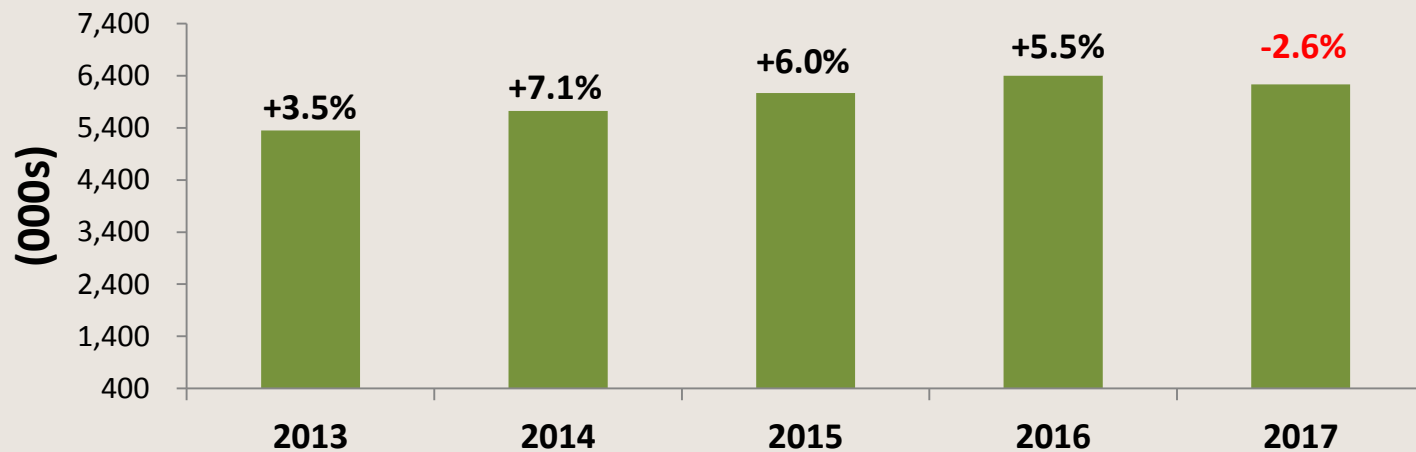
One of the banks that is part of the Federal Reserve is predicting solid economic growth in the fourth quarter. The Federal Reserve Bank of New York is now forecasting GDP growth of 3.1% in the last quarter of 2017. This would be a similar rate of growth to the 3.0% seen in the third quarter and the 3.1% in the second quarter, and it would make 2017 the strongest year for GDP in at least a decade. Source: [Reuters](#)

BRANSON 3Q PERFORMANCE

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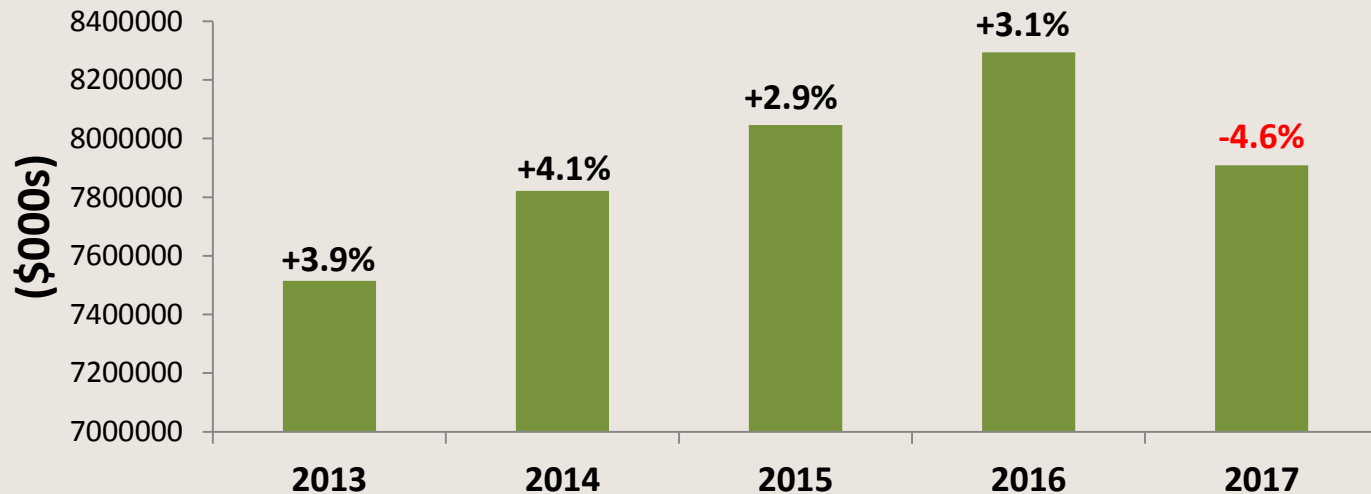
BRANSON ESTIMATED VISITATION

3rd Quarter YTD 2017



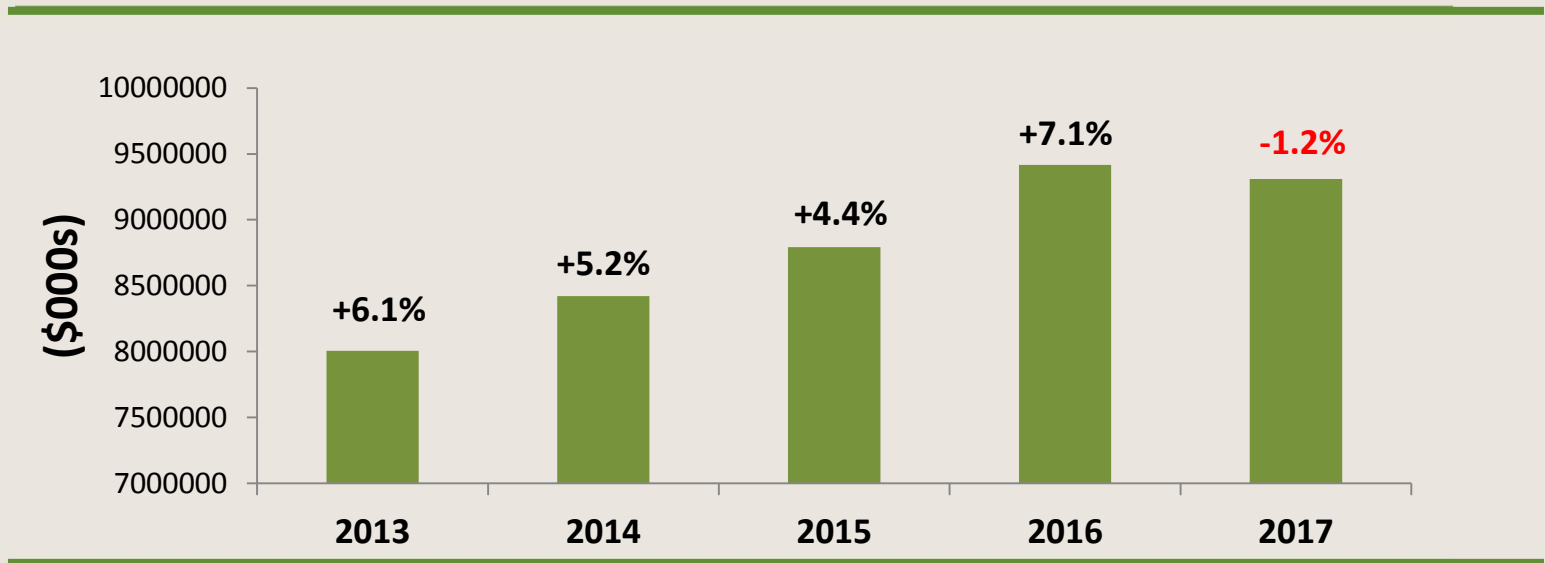
CITY OF BRANSON SALES TAX

3rd Quarter YTD 2017



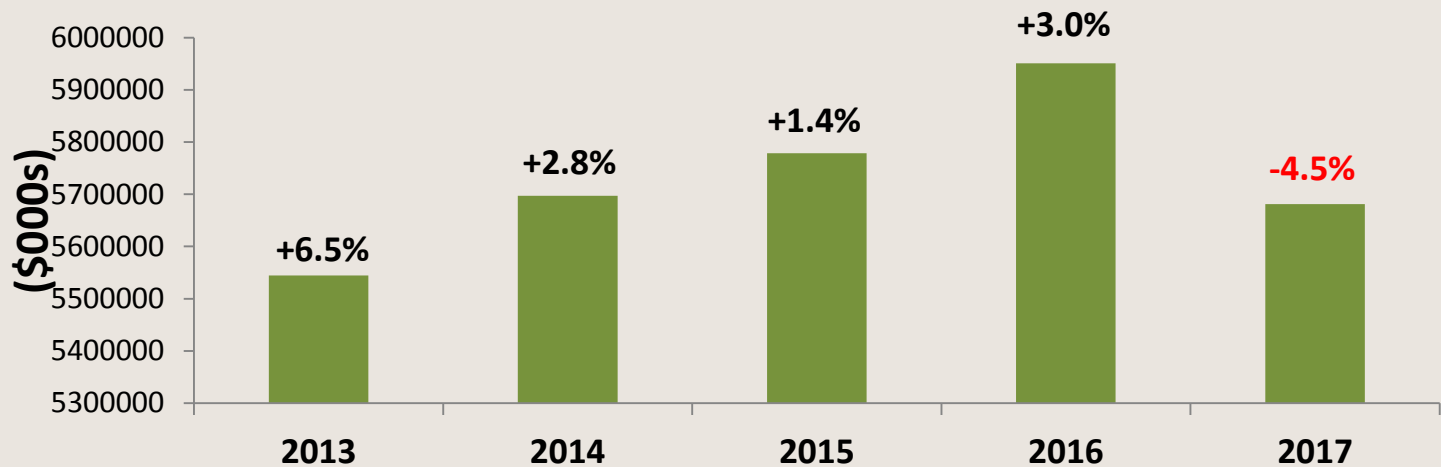
CITY OF BRANSON TOURISM TAX

3rd Quarter YTD 2017



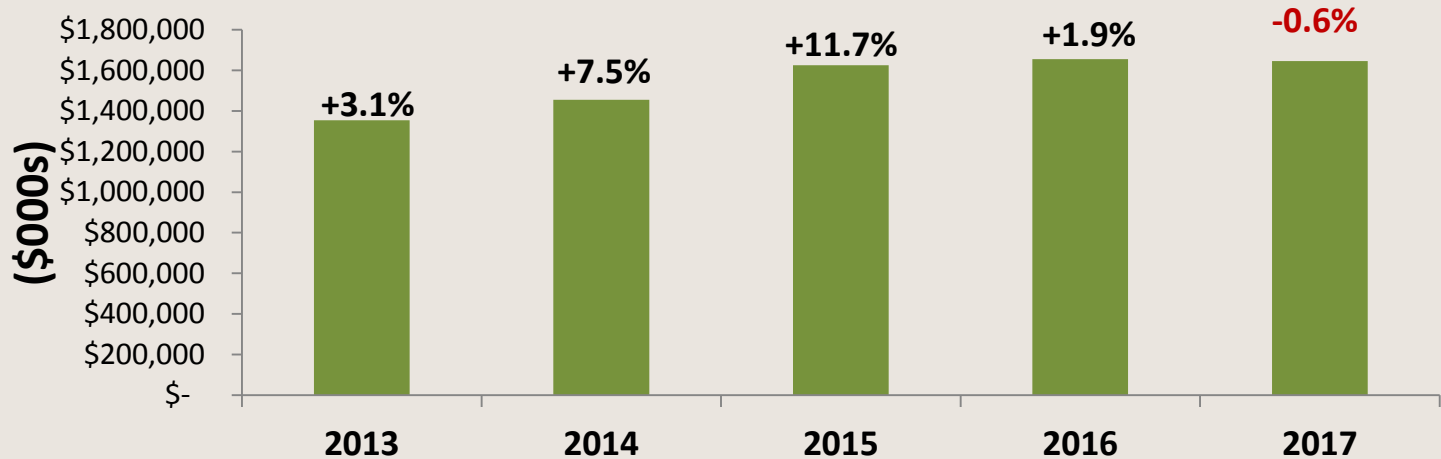
TCED TOURISM TAX

3rd Quarter YTD 2017



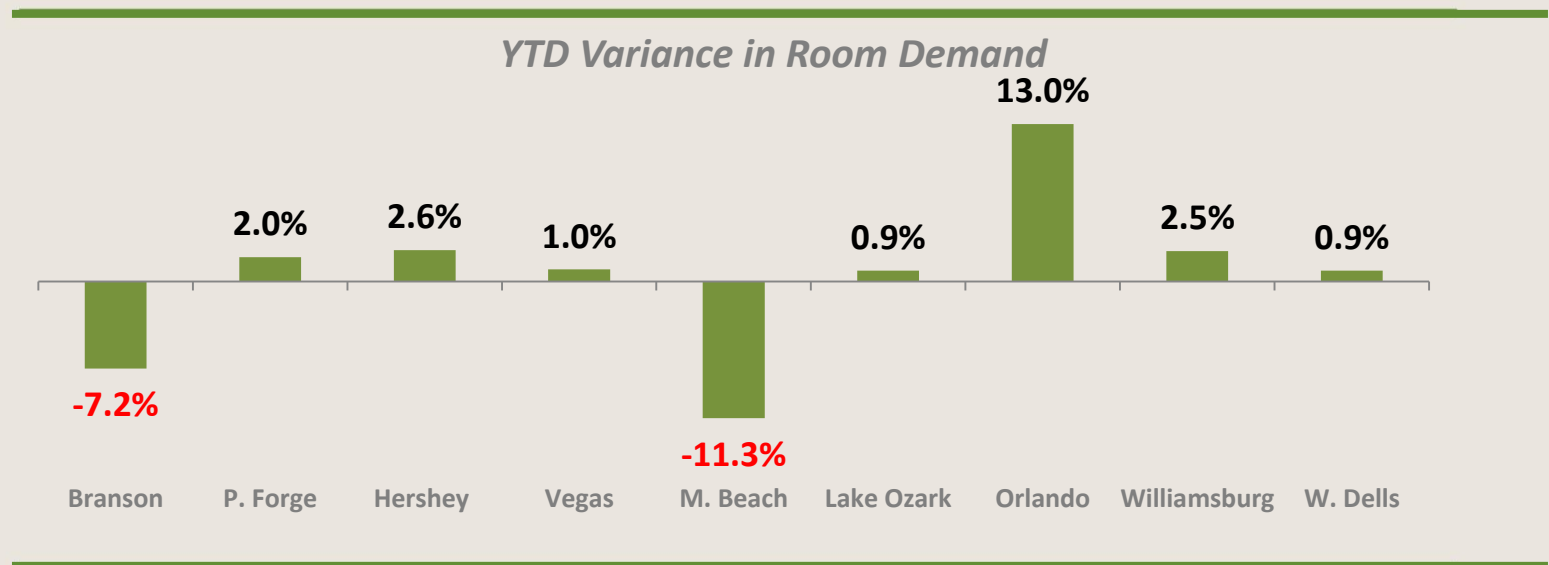
STONE COUNTY TAX

3rd Quarter YTD 2017



ROOM DEMAND COMPARISON

3rd Quarter YTD 2017



BRANSON VISITOR UPDATE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF AUGUST 31, 2017

YTD VISITOR TRENDS

METRIC	2017	2016	VAR
SPENDING/PARTY	\$970	\$920	+\$50
FIRST-TIMERS	24%	21%	+3%
% FAMILIES	45%	48%	-3%
AVG ADULT AGE	55.5 yrs	53.8 yrs	+1.7 yrs
LOS	4.4 nts	4.0 nts	+0.4 nts
% SEEING SHOWS	71%	70%	+1%
AVG # SHOWS SEEN	3.3	3.0	+0.3

n = 1,101; MOE = +/- 3.0% at a 95% Confidence Interval.

VISITATION BY MARKET

METRIC	% VISITORS	VAR TO 2016
CORE MARKETS	17%	+ 1%
PRIMARY MARKETS	32%	+ 1%
OUTER MARKETS	30%	+ 0%
NATIONAL MARKETS	21%	- 2%
TOTAL	100%	+0.0%

SOURCE: H2R MARKET RESEARCH, AUGUST 2017 YTD

MOST INFLUENTIAL SOURCES

19%

Searched online
for a specific
Branson
business

20%

Discussed
Branson with a
friend

21%

Looked up Branson
on my computer at
home

DEPARTMENT UPDATES

LEISURE GROUP SALES

- **August 2017 Branson hosted 13th Annual Military Reunion Planners Conference**
 - 14 Reunion Planners from 12 states and their guests for a total of 26 people.
 - 25 Branson businesses participated ½ day of business trade session appointments
 - Survey results noted 100% of planners will book reunion to Branson as result of FAM.
 - All branches were represented: Army, Navy, Marines, Air Force and Coast Guard
- **August 2017 – Attended SYTA in ABQ, NM. The Student Youth & Travel Association**
 - Hosted “All Delegate” Branson Breakfast Show for 600 attendees.
 - Show featured Haygoods, Buckets & Boards and Legends Performer, Bruno Mars
 - 18 Branson businesses sponsored the breakfast in partnership with the CVB
- **September 2017 – Attended Governor’s Conference on Tourism in Branson**
 - CVB hosted opening night event for 200 attendees at Branson Landing

PUBLIC RELATIONS

- Aug. 16 announcement of Silver Dollar City's new Time Traveler coaster garnered \$2.05 million in ad equiv.
- Branson's Entertainment District won USA TODAY 10Best Readers' Choice travel contest for the state of Missouri in August.
- Peter Greenberg's 3-hour CBS radio network show aired on Sept. 30. It was taped live in Branson with 9 Branson stories and an ad equiv of \$280,000.

SPORTS MARKETING AND DEVELOPMENT

July 1-2:	USSSA Boys U11 World Series
July 10-16:	USSSA Girls U9, 10 & 11 World Series
July 7-23:	FASA Girls U14-U18 World Series
July 24-30:	FASA Girls U8-U12 World Series
Aug 3-10:	Cal Ripken Major/70 U12 World Series
Aug 15-19:	YBN U12 National Championship
Sept 9-10:	BPS Outdoor Days
Sept 29-Oct 1:	WWAST Alumni Kid's Camp



Event Support:

- 6 Sports Event Welcome Tables and 2200+ Backpacks Distributed

Turned Definite: 3 groups, 8800+ Estimated Room Nights and 5,400,000+ Estimated Total Business Sales

Department Travel, Training and Sponsorships:

Aug 7-9:	HUG - Sports Tourism & Venue Development Presentations
Aug 24-27:	Show-Me MO Co-op Sponsorship, Connect Sports
Sept 12-15:	S.P.O.R.T.S. – The Relationship Conference and Sponsorship

Ballparks of America Named #4 Ballpark Every Planner Must See *by readers of Sports Event's Magazine*

Table Rock and Bull Shoals recognized among the top 100 Best Bass Lakes *by Bassmaster Magazine!*

MEETINGS & CONVENTIONS



- Distributed 61 Meeting RFPs into the community
- Created and presented new video #greatjobgary to 2,500 attendees at Connect Marketplace
- Booked 14 events, totaling 4,175 room nights
- Total Economic Impact for 3Q: \$1,952,031

DIGITAL MARKETING

ExploreBranson.com

- 608,943 site visits
- 1,679,944 pageviews
- Top locations:
 - Chicago
 - St. Louis
 - Dallas

Social & Content

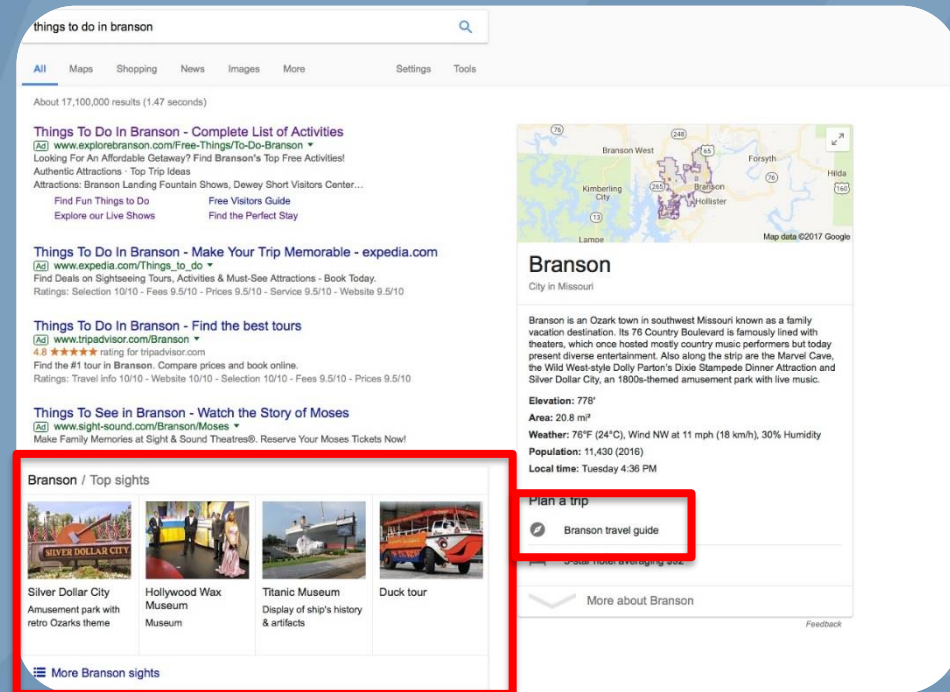
- Completed four-part Christmas video series shoots
- Completed selfie star social campaign

- Selected as one of two destinations to launch pilot program with Google in partnership with Miles
 - Goal: evaluate and optimize Branson related content being pulled into Google's Travel Guides.



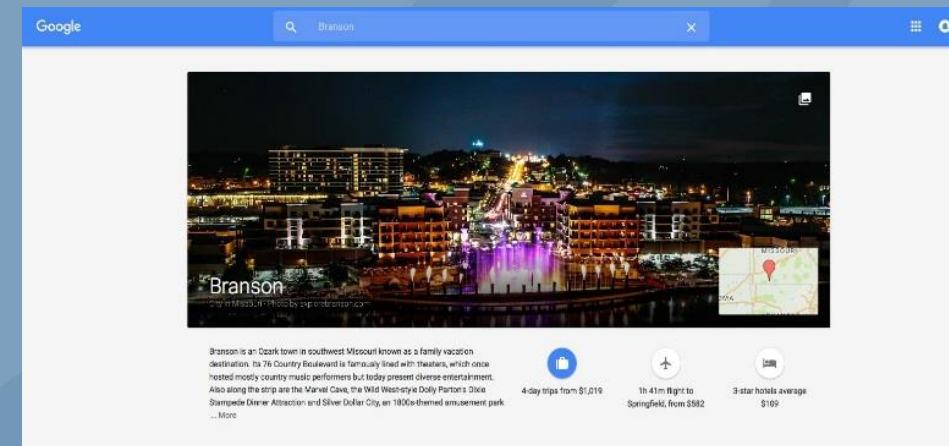
Google's Travel Guides

- Newer product whose content is created algorithmically
- Google has increasing visibility in search results
- Program overview:
 - Part 1: Evaluation
 - a. Reviewing Branson-related content in various Google products and providing feedback to Google on quality
 - Part 2: Activation:
 - b. Improving business information and content quality in Google Products



Google's Travel Guides

- Updated the Travel Guide homepage hero image
- Provided input on content issues to Google product teams
- Audited “Top Sights” in Travel Guide
- Identified opportunities to improve content
- Included closed businesses, non-tourism businesses and missing information
- Made corrections to programmatic errors and bugs
- Uploaded 110+ photos which have generated over 300,000+ in about 12 weeks
- Improved structured data markup on ExploreBranson.com which generated 3x increase in event and show information in search results
- Pushing more information beyond the website



Questions?

THANK
YOU